

NEXTOREx

NEXTOREx Users, Roles & Permissions

Add staff and control what they can do.

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How access works: plans, roles and permissions

Understand what your plan allows, and how roles decide what each staff member can do.

Plan: All plans

What this does

Two things decide what a person can do in NEXTOREx:

1. **Your plan** decides what your business can use at all. For example, accounting vouchers and bank features come with Business and higher plans, and Basic Manufacturing comes with Pro and higher plans.
2. **A role** decides what each staff member can do inside what your plan allows. For example, a cashier role can use POS Checkout and customers but not accounting.

A role can never give someone something your plan does not include.

Plans are bought per application: ERP/POS, CRM and Education each have their own packages. A person can open an application only if your account has a package for it and their role allows it. In Education, a teacher who is assigned to a Subject and Section sees only those Sections for attendance, marks and learning material. See [Education plans, limits and combining apps](#).

How to see it

- Open **User Management**, then **Roles** to see your roles. The list shows how many permissions each role has and how many users have it.
- Open **User Management**, then **Permissions** to see the full list of permissions NEXTOREx has. This is a reference list. You give permissions to people through roles.

Home • User Management • Permissions

Permissions

Global permission catalogue (read-only — catalogue changes are restricted to system administrators).

Columns			
PERMISSION	MODULE	TYPE	ORDER
Search...	All modules		
AcademicGroup.view	AcademicGroup	view	1
AcademicSection.view	AcademicSection	view	1
AcademicStructure.view	AcademicStructure	view	1
Accounting.view_coa	Inventory Accounting	view_coa	1
ActionCenter.view	Action Center	view	1
AdHocFee.manage	AdHocFee	manage	1
App.manage_default	App	manage_default	1
Appointment.view	CRM Appointment	view	1
Assignment.view	Assignment	view	1
Attendance.view	Attendance	view	1
Bank.view	Inventory Bank	view	1
BillingCatalog.update	Billing Catalog	update	1

Each permission belongs to a module, for example Customer or Warehouse.

What happens next

- To create a role, see [Roles](#).
- To give a role to a person, see [Add a user](#).
- If a menu item or a button is missing for someone, check their role first, then check that your plan includes the feature.

Important notes

- The person who sets up the business gets an **Admin** role. Keep the Admin role for the people who run the business.

Related guides

- [Roles](#)
- [Add a user](#)
- [Staff and staff attendance](#)

Roles

Create a role for a type of job, choose what it can do, and see which users have it.

Plan: All plans

What this does

A role is a set of permissions for a type of job, such as Sales Staff. When you give a person a role, they can do what the role allows and nothing more.

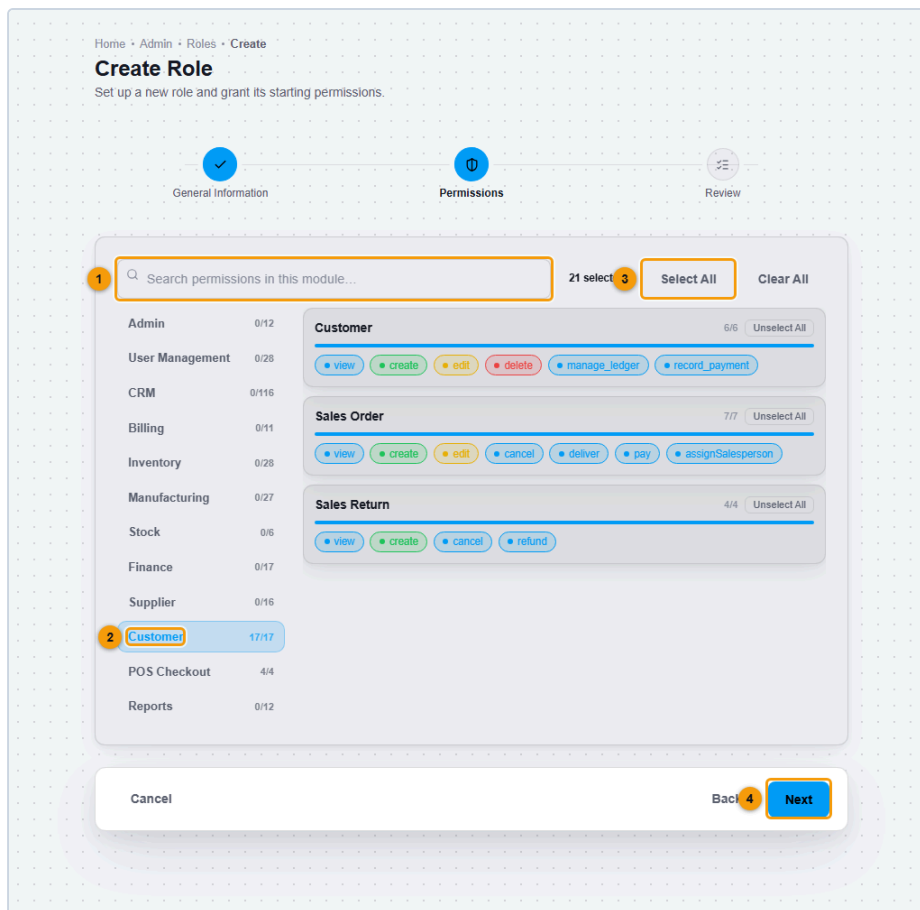
Steps

1. Open **User Management**, then **Roles**.
2. Click **Add Role**. The **Create Role** page opens with three steps: **General Information**, **Permissions** and **Review**.

Name the role (1), then click Next (2).

3. Enter the **Role name** (1), for example *Sales Staff*. If you have more than one company, choose the **Company**. Then choose the **Hierarchy** (see below). Click **Next** (2).
4. On the **Permissions** step, choose what the role can do.
 - The list on the left shows modules, such as **Customer**, **Inventory** and **POS Checkout**, with how many permissions you picked in each.
 - Click a module (2). Each feature shows buttons such as **view**, **create**, **update** and **delete**. Click the ones you want, or click **All** for that feature.

- Click **Select All** (3) to pick every permission in the module you are viewing.
- Use the search box (1) to find a permission.



Search (1), pick a module (2), Select All (3) and Next (4).

5. Click **Next** (4).
6. Check the **Review** page. It shows the role name and how many permissions are selected in each module.

Home • Admin • Roles • Create

Create Role

Set up a new role and grant its starting permissions.

✓

✓

☰

General InformationPermissionsReview

Review the new role before creating it.

Role Name	Sales Staff
Company	Harbor Trading Co
Hierarchy Node	a62815db-65f1-468c-92ec-cc6ec366b08a
1 Total Permissions Selected	21

Permissions by module

Customer: 6	Sales Order: 7	Sales Return: 4	Pos: 4
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Cancel

Back 2

Create Role

Check the summary, then click Create Role.

7. Click **Create Role**.

Choose the hierarchy of a role

Every role belongs to one place in your hierarchy: a Business Group, a Legal Entity, an Operating Unit or a Sub Unit. On **General Information**, the **Hierarchy** box asks **Where does this role belong?**

Home • Admin • Roles • Create

Create Role

Set up a new role and grant its starting permissions.

General Information

Permissions

Review

ROLE NAME *

Section Coordinator

HIERARCHY *

1 Where does this role belong?

Default Operating Unit
Operating Unit

Default Sub Unit
Sub Unit

Sibling Campus
Sub Unit

The Hierarchy box (1) lists only your own place and the places beneath it.

- The list shows **only the places you are allowed to manage**: your own place and the places beneath it.
- A user at a higher level, for example an Operating Unit manager, can create and manage roles for the Sub Units beneath them.
- A user at a lower level cannot create a role in a parent, a sibling or an unrelated branch, and those places never appear in the list.
- The hierarchy of a role is fixed when you create it. Only its permissions can be changed later.

The role and staff lists you choose from when you add a user or a staff member follow the same rule. You see only the roles of your own place and the places beneath it.

What happens next

The role appears in the **Roles** list with its number of permissions and **Assigned users**.

Home • Admin • Roles

Roles

Roles and their permission grants.

Click a row to select it, double-click to open the profile, right-click for actions.

Add Role

						Columns
☐	ROLE NAME ↕	COMPANY	HIERARCHY	PERMISSIONS	ASSIGNED USERS ↕	CREATED AT ↕
Search role name... Filter company (this pag						
☐	Admin	Harbor Trading Co	Default Sub Unit	341	1	10/15/2026
☐	Admin	Harbor Trading Co	Default Sub Unit	341	0	10/15/2026
☐	Sales Staff	Harbor Trading Co	Default Sub Unit	21	0	10/16/2026
☐	Student	Harbor Trading Co	Default Sub Unit	7	0	10/15/2026

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Your roles.

To see or change a role later, double-click it in the list.

Important notes

- Only permissions that your plan includes are useful. A role cannot unlock a feature your plan does not have.
- For a teacher, give only what the job needs, for example marking attendance and entering marks. The Subjects and Sections they teach come from their assignment on the **Staff** screen, not from the role. Giving a role the permission to manage the learning tools gives access to every Subject and Section. See [Staff and staff attendance](#).
- Start with the fewest permissions a job needs. Add more if the person cannot do something they need.

Related guides

- [How access works](#)
- [Add a user](#)

Add a user

Add a staff member, choose which apps they can open, and give them a role in your business.

Plan: All plans (the number of users depends on your plan)

What this does

Adding a user gives a staff member their own login. You choose which apps they can open and which role they have.

Before you start

- Create the [role](#) the person will have.
- Check your plan's user limit. Open **Billing**, then **Subscription & Plans**, then **My Plan** and look at **Users** under Usage.

Steps

1. Open **User Management**, then **Users**.
2. Click **Add User**. The **Create User** page opens with three steps.

Step 1: Basic Info

Name (1), email (2), password (3), department (4) and designation (5).

1. Enter the **First name** and **Last name** (1), and the **Email** (2). The email is what the person signs in with.

2. Enter a **Password** (3) and type it again in **Confirm password**. The page shows a checklist: at least 8 characters, one uppercase letter, one lowercase letter, one number and one special character, with no spaces.
3. Choose the **Department** (4) and then the **Designation** (5). Both are required. Choose Department first, because Designation depends on it.
4. Under **App access**, each app shows **Granted** or **Not granted**. Use the **Access** button to choose which apps this person can open.
5. Click **Next**.

Step 2: Personal Info

1. These details are optional, for example date of birth and address. Click **Next**.

Step 3: Company & Hierarchy

1. Click + **Add Assignment**. Choose the **Company**, then each level below it: **Business Group**, **Legal Entity**, **Operating Unit** and **Sub Unit**. Each box fills after you pick the one before it.
2. Choose the **Role**. The list contains only roles from your own place in the hierarchy and the places beneath it.
3. Mark the assignment as **Primary**.

Home > User Management > Users > Create

Create User

- 1 Set up a new user account and assign their first company / hierarchy / role
- 2 Add at least one Company / Business Group / Legal Entity / Operating Unit / Sub Unit / Role assignment for this user, and mark one as Primary

Basic Info Personal Info Company & Hierarchy

Organization access
Assign at least one sub-unit and role. One assignment must be primary.

COMPANY	BUSINESS GROUP	LEGAL ENTITY	OPERATING UNIT	SUB UNIT
Harbor Trading Co	Main Branch	Harbor Traders (Pvt)l	Head Office	Sales Counter

ROLE

Sales Staff	☒ Primary
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+ Add Assignment

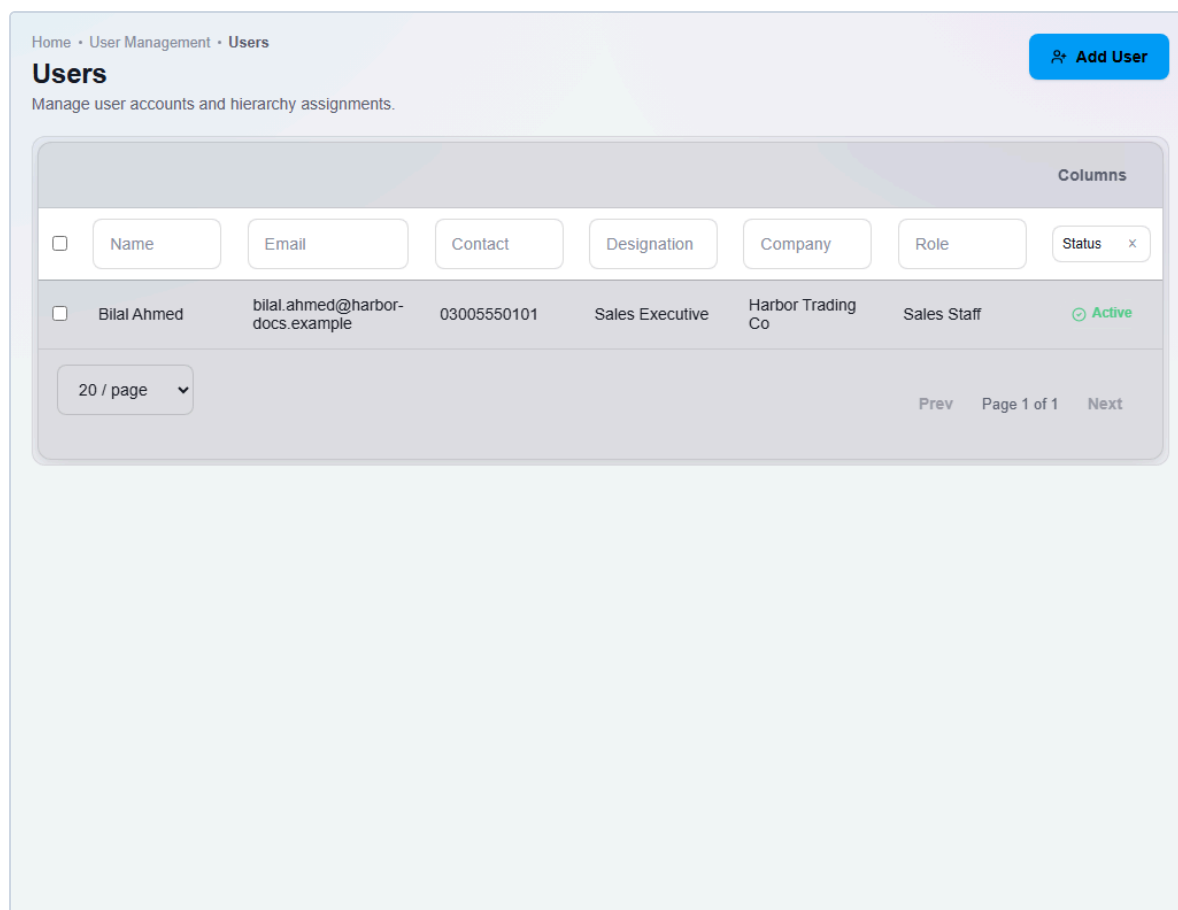
Cancel Back Create User

Where the person works and their role.

4. Click **Create User**.

What happens next

The person appears in the **Users** list with their designation, company and role.



The screenshot shows the 'Users' management page. At the top, there's a breadcrumb 'Home > User Management > Users' and a blue 'Add User' button. Below the title 'Users', it says 'Manage user accounts and hierarchy assignments.' A table lists users with columns: Name, Email, Contact, Designation, Company, Role, and Status. One user, Bilal Ahmed, is listed with email bilal.ahmed@harbor-docs.example, contact 03005550101, designation Sales Executive, company Harbor Trading Co, role Sales Staff, and status Active. A pagination bar at the bottom shows '20 / page' and 'Page 1 of 1'.

	Name	Email	Contact	Designation	Company	Role	Status
☐	Bilal Ahmed	bilal.ahmed@harbor-docs.example	03005550101	Sales Executive	Harbor Trading Co	Sales Staff	Active

The new user is listed as Active.

They can sign in with their email and password.

Important notes

- Every user needs at least one assignment to a Sub Unit with a role. One assignment must be primary.
- To give someone more than one place or role, click + **Add Assignment** again.
- Every user uses one **User** seat of your plan. A staff member added in Education, under **HR, Staff**, also uses one seat. **Student portal logins do not use seats.** See [Education plans, limits and combining apps](#).
- If you have reached your plan's user limit, ask to add more users or move to a bigger plan. See [Your plan](#).

Related guides

- [Roles](#)
- [Your company and branches](#)
- [Staff and staff attendance](#)

Your company and branches

Understand your company, business groups and units, and how staff are placed in them.

Plan: All plans

What this does

NEXTOREx organises your business as a tree. You set it up once when you first sign in, and you place staff in it when you add them.

From top to bottom the levels are:

1. **Company**
2. **Business Group**, for example a branch or a division
3. **Legal Entity**
4. **Operating Unit**
5. **Sub Unit**, the smallest level where staff work

Small businesses usually have one of each. Setup creates them for you.

Steps

To see your structure:

1. Open **Admin**, then **Hierarchy**.
2. Choose your **Company** at the top if you have more than one.
3. Read the tree. Click the small arrow on a row to open or close it.

Home • Admin • **Hierarchy**

Hierarchy

Business Group → Legal Entity → Operating Unit → Sub Unit. Drag a row to re-parent or reorder it.

[Setup Wizard](#) [+ New Business Group](#)

COMPANY

Harbor Trading Co

Business Group

Main Branch

1 child

Legal Entity

Default Legal Entity

1 child

Operating Unit

Default Operating Unit

1 child

Sub Unit

Default Sub Unit

★

One Business Group with its Legal Entity, Operating Unit and Sub Unit.

To change it:

- Each row has small icons to view, add, edit and delete.
- Click **New Business Group** to add a new branch or division at the top.
- Click **Setup Wizard** for guided setup.

To see your companies, open **Admin**, then **Companies**.

Home • Admin • Companies

Companies

Companies within your tenant hierarchy.

New Company

Right-click a row for actions

Columns

NAME	CODE	PHONE	EMPLOYEES	REVENUE RANGE	CURRENCY	STATUS
Search name...	Search code...					All ×
Harbor Trading Co	000001	—	—	—	PKR – Pakistani Rupee	Active

20 / page ▼

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Your companies.

What happens next

The top bar shows where you are working, for example *Main Branch / Default Legal Entity / Default Operating Unit / Default Sub Unit*. When you [add a user](#), you place them at a Sub Unit and give them a role.

What counts as one hierarchy

Some accounts have a limit on how many hierarchies they can have. This is how they are counted:

- **One hierarchy is one Business Group and everything under it**, including its Legal Entities, Operating Units and Sub Units.
- Your **Company** does not count as a hierarchy.
- Adding a Legal Entity, an Operating Unit or a Sub Unit inside a Business Group does **not** use another hierarchy.
- Another, independent Business Group is another hierarchy.

The standard NEXTOREx plans do not limit the number of hierarchies. A limit applies only when one has been set for your account. This is separate from the number of client businesses an Agency can have. See [Agency limits and rules](#).

Important notes

- The first-time setup asks for a name for each level. If setup stops with an error after you go back and start again, use new names rather than names you already entered, or ask support.
- A star appears next to the default Sub Unit.

Related guides

- [Complete your company setup](#)
- [Add a user](#)
- [Agency limits and rules](#)

Edit a user and change where they work

Change a staff member's details, switch their account off, or move them to another branch or unit with Assign Hierarchy.

Plan: All plans

What this does

You can change a staff member's details after you add them, switch their account off, and change which branch or unit they work in.

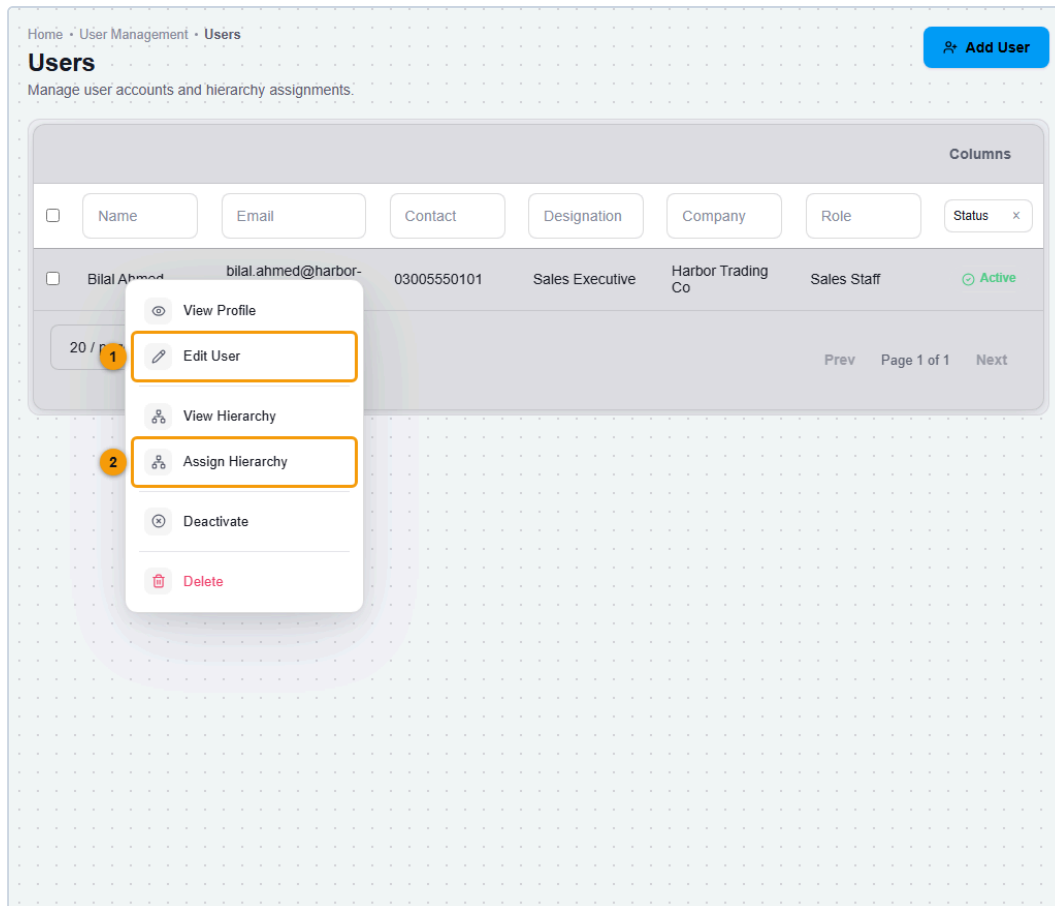
Plan, role and place: how they fit together

- **Plan** is what your business is entitled to. It decides which apps and features exist for the business.
- **Role** (permissions) is what a staff member may do inside those features.
- **Hierarchy** is the place in your company tree where the staff member works, for example *Main Branch / Head Office / Sales Counter*. See [Your company and branches](#).

A staff member needs all three: a plan that includes the feature, a role that allows the action, and a place in your hierarchy.

Open the user's menu

1. Open **User Management**, then **Users**.
2. Right-click the person.

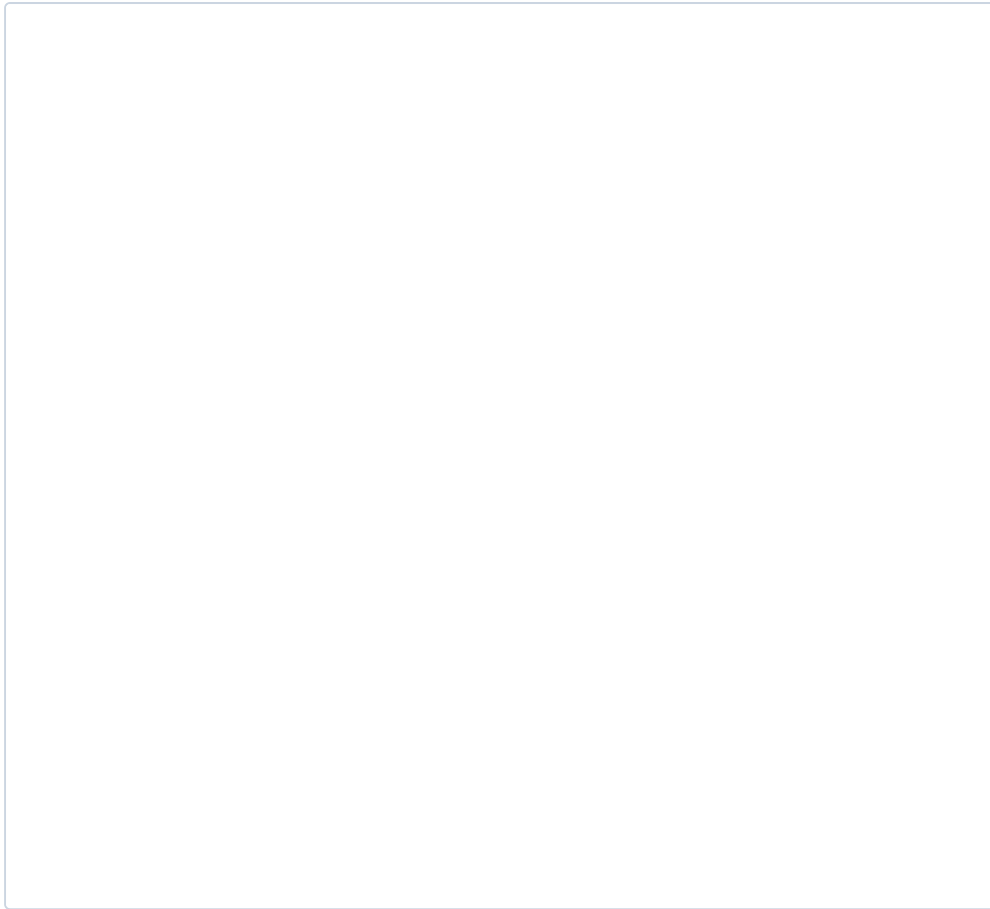


Edit User (1) and Assign Hierarchy (2).

The menu has **View Profile**, **Edit User**, **View Hierarchy**, **Assign Hierarchy**, **Deactivate** and **Delete**.

Edit the details

1. Choose **Edit User** (1).
2. Change the name, contact number, **Department**, **Designation** or join date. Leave **Password** empty to keep the current password.
3. Use the **Active** setting to switch the account on or off.

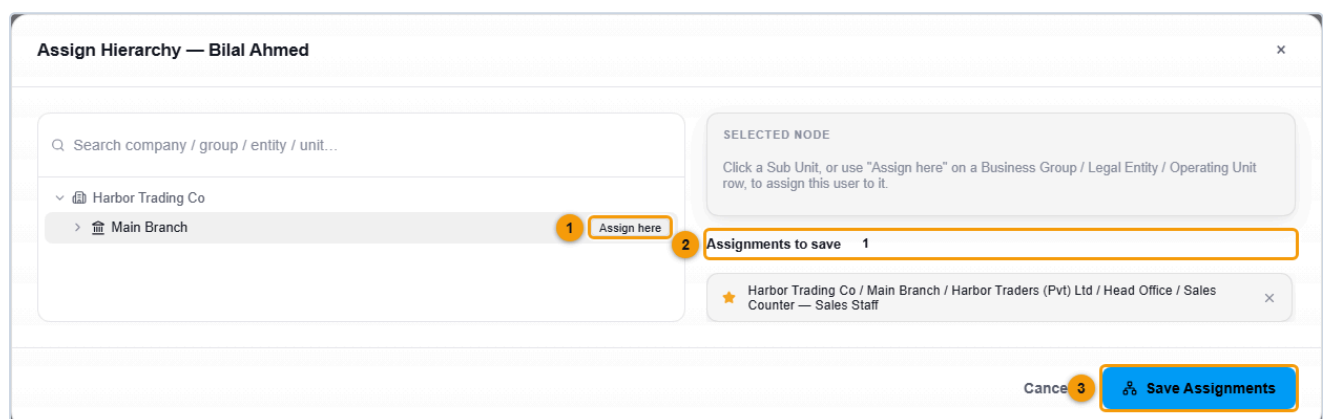


The basic details. App access shows which apps the person can open.

4. Use the **Access** button next to an app to grant or remove that app for this person.
5. Use the buttons at the bottom of the page to continue and save.

Move someone to another branch or unit

1. Choose **Assign Hierarchy** (2).
2. In the tree, click a **Sub Unit**, or click **Assign here** (1) on a Business Group, Legal Entity or Operating Unit row.
3. Check **Assignments to save** (2). Each row shows the full place and the role, and the star marks the primary place.
4. Click **Save Assignments** (3).



Assign here (1), Assignments to save (2) and Save Assignments (3).

Use **View Hierarchy** to see where a person is placed without changing it.

Important notes

- Changing a role, a place or an app does not change your plan. If a feature is not on your plan, no role can unlock it.
- **Deactivate** and **Delete** are in the same menu. Check the person before you use either.

Related guides

- [Add a user](#)
- [Roles and permissions](#)
- [How access works](#)